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ABSTRACT

Values are assumed to be critical factors in the operations and outcomes of organizations. To better understand how values operate in an educational setting, the Bennett-Woods' three-factor model was used to identify the presence and relative strength of shared values in a university within a targeted sample of faculty, administrators, and other staff. A survey instrument was designed for the field test of hypotheses derived from the model and three separate exploratory factor analyses were conducted. The first analysis examined all variables, the second explored questions related to personal values, and the third looked at organizational values. Cross tabulations explicated relationships among variables descriptive of subjects and the three types of values. The results suggest that there is a general consistency between the relative importance of espoused organizational values and the personal values of the employees. However, those values are not clearly and consistently expressed in the daily structures, interactions, and processes of the organization. Despite limitations on interpretation due to the size of the study, findings encourage further research. (EMK)

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Identifying Shared Values in an Educational Setting

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Identifying Shared Values in an Educational Setting

The concept of *values* within an organization has become popularized in the business literature as a tool for leadership and a strategy for organizational development and performance improvement (Francis & Woodcock, 1990; Marshall, 1995; O'Toole, 1996; Peters & Waterman, 1982; Senge, 1990). Research, primarily conducted in corporate and governmental settings, has also focused on the role and importance of values in organizational performance (Hinings, Thibault, Slack, & Kikulis, 1996; McDonald & Ganz, 1992; Posner & Schmidt, 1993). Although evidence has been found generally to support a primary role for values within organizations, researchers have been imprecise and inconsistent in the definition and application of terms such as organizational values, core values, shared values and shared meanings (Bennett-Woods, 1996; McDonald & Gandz, 1992). Furthermore, very little research has been conducted examining the role of values in organizational performance in an educational setting.

This study focused specifically on the concept of shared values in an educational setting. The purpose was to use a three-factor model (Bennett-Woods, 1996) to identify the presence and relative strength of shared values in a university within a targeted sample of faculty, administration and staff.

Review of the Literature

Values are assumed to be critical factors in the operations and outcomes of organizations, particularly as examined in the general area of business. Denison (1990), in a study of the effectiveness of 34 organizations, hypothesized that the management practices of an organization are rooted in its values and beliefs. He found strong evidence that effectiveness was a function of the interrelation of core values and beliefs, organizational policies and practices, and the business

environment of the organization. Similarly, through an extensive review of literature, Hinings, et al. (1996) argued that organizational structures and processes result from an underlying set of ideas, beliefs and values. Other writers have posited the importance of values in specific contexts such as daily decision making (Senge, 1990), organizational change (Kabanoff, Waldersee, & Cohen, 1995; Nohria & Ghoshal, 1994) and workforce diversity (Loden & Rosener, 1991).

The importance of values to the effectiveness of educational organizations is discussed in much the same terms and context as in the general business literature. Rogers and Ballard (1995), in a discussion of organizational transformation in higher education, argued that building shared values is a critical component of the aspirational management strategy. Ryan (1992), in a study of the impact of conflicting values on the shared values within a secondary school, found strong evidence of shared values among the teachers as well as evidence that those values are transmitted into practice. Dalton (1993) discussed the strategic implementation of essential values in relation to student services in the higher education setting. Finally, Singh (1995) posited the need to identify shared values within the context of multicultural education as a means to integrate values and promote social harmony.

Despite strong evidence of the importance of values, there appears to be little effort to specifically define the concept of shared values in an organizational setting. There is also little agreement on the origin or evolution of values within an organization, the efficacy of specific values, or the basis upon which values can be considered shared (Bennett-Woods, 1996). In fact, many of the approaches taken appear to conflict. For example, most writers reviewed assumed that organizational values originate within senior or executive management and are disseminated to employees through various methods of socialization or selection (Hinings, et. al., 1996;

McDonald & Ganz, 1992; Nohria & Ghoshal, 1994; Peters & Waterman, 1982). However, other writers focused on the importance of the individually held values of all members in creating an organizational culture based on shared values (Frantz, 1995; Loden & Rosener, 1991; Senge, 1990).

Conceptual Framework

Bennett-Woods (1996), in a review of literature on shared values, was unable to identify a definition of shared values that could be operationalized to identify specific values meeting a measurable criterion of "shared." As a result, she used the findings of previous studies to hypothesize a conceptual definition of shared values. From this definition, a three-factor model for identifying and measuring shared values was derived.

For the purpose of this study, shared values were defined as a subset of commonly held individual and espoused organizational values which support the strategic and operating goals of the organization and which are evident in the formal and informal structures, processes and daily interactions of the organization. The three-factor model (Figure 1) incorporates *personal values*, *espoused organizational values* as derived from strategic and operational goals, and actual formal and informal *structures, processes and interactions* of the organization and its members. Throughout this paper, the third element of the model (structures, processes and interactions) is referred to as expressed organizational values. The application of this model is based on three general assumptions which are illustrated in Figure 2:

1. The values espoused by the organization in support of its strategic and operating goals can be identified through review of formal documents such as mission and values statements, strategic plans and operating plans (Hinings, et.al., 1996).

2. The consistency between personal values and the espoused values of the organization can be measured by surveying the employees (Liedtka, 1989).
3. Employees can identify, by survey, specific examples of the expression, or absence of expression, of values meeting the first two assumptions in the formal and informal structures, processes and interactions of the organization (expressed organizational values).

Research Problem

The primary purpose of the study was to field test the proposed three factor model of shared values through development of an organization-specific tool which measures the consistency between espoused organizational values and personally held values as well as the perception of the extent to which espoused values effect the daily operations of the organization. The following hypothesis was proposed:

1. The relative strength of personal values, and the extent to which organizational values are evident in the daily structures, processes and interactions of the organization can be measured through employee survey.

A secondary purpose of the study was to determine the extent to which shared values, based on the three factor model, exist within the College of Education at the University of Northern Colorado. With respect to this purpose, two additional hypothesis are proposed:

2. The espoused values of the College of Education will be consistent with important personal values of the employees.
3. The espoused values of the College of Education will be expressed in the daily structures, processes and interactions of the College.

Methods

Prior studies on shared and/or organizational values have overwhelmingly focused on senior and executive management as noted by Bennett-Woods (1996) in a review of literature. The present study, conducted in an academic setting, surveyed staff and faculty representatives as well as members of management and administration. In addition, prior studies have generally employed existing lists or scales of values (Liedtka, 1989; Schmidt & Posner, 1982). The present study examined espoused values specific to the organization as identified in its formal documents.

Site and Sample Selections

The study was conducted in the College of Education at the University of Northern Colorado. The study population included all faculty, staff and administrators as identified from an employee list provided by the College of Education. This yielded a population of 100 participants.

Instrumentation

The survey instrument used for this study was a self-designed survey (Appendix A) based on a five item Likert scale with one open-ended question. Demographic data was limited to length of service and job classification. The five values studied, as identified through an analysis of formal documents, included quality, social responsibility, collaboration, diversity and inquiry.

The instrument contained 13 survey items specifically devised to determine the extent to which values espoused by the College of Education are consistent with important personal values of the employees, and 29 items measuring the extent to which these values are perceived as being expressed within the structures, processes, and interactions of the College. Two additional items identified job classification and length of service. One open-ended question invited additional

comments. With regard to individual values, respondents were asked to rate each value in terms of importance to them individually. With regard to expressed values, respondents were asked to rate their level of agreement with statements regrading the expression of espoused values in common structures, processes and interactions (e.g., organizational structure, allocation of human and financial resources, recruitment and hiring practices, communications). The instrument was piloted by three faculty members and a graduate assistant within the College of Education.

Procedure

Five espoused values of the organization (quality, social responsibility, collaboration, diversity and inquiry) were identified through a content analysis of formal documents provided by the College of Education, and subsequently verified by the Dean through interview. Francis and Woodcock (1990) suggested eight conditions for clarifying organizational values including selection from alternatives, consistency, limited in number, actionable, performance enhancing, attractive and pride-giving, capable of being communicated, and written down. These general criteria served as guidelines in the identification and selection of espoused organizational values.

The survey was designed based on the above identified values. The survey instrument was distributed by campus mail to the 100 employees of the College of Education. Forty-nine instruments were returned for an overall response rate of 49%. A follow-up mailing to all respondents resulted in only one additional survey response. Surveys were not coded by individual or division ensuring anonymity of all responses.

Data Analysis

Survey results were coded and compiled using EQS software for quantitative statistical analysis of the data. The two methods of data analysis employed were an exploratory factor

analysis and cross tabulations using mean scores. The descriptive data produced from the cross tabulations was based on variables related to length of service and job classification.

Factor Analysis consists of a number of statistical methods used to simplify data into factors. Factors represent statements about the relationship between variables. For this study, three separate exploratory factor analyses were conducted. The first analysis examined all variables (Items 1-42), the second examined questions related to personal values (Items 1-13), and the third analysis examined all questions related to expressed organizational values (Items 14-42). The goal of the exploratory factor analysis was to discover the underlying relationships and dimensions in the data through the examination of Eigen Values, principal components, direct Oblimin Solutions, and factor correlation matrices.

Data analysis based on descriptive data was conducted using cross tabulations. The relative importance of espoused organizational values as personal values (Items 1-13) was established using mean scores for respondents. Expressed organizational values (Items 14-42) were grouped and described by their mean score. Additional variables included grouped questions related to each of the five espoused values (diversity, collaboration, social renewal, inquiry, and quality). The cross tabulations were conducted using mean scores from each of the above variables relating them to length of service and job classification. Length of service at UNC was divided into the following categories: less than one year, one to five years, six to ten years, and more than ten years. Job classification was divided in the following manner: administration, assistant faculty, associate faculty, full faculty, and staff. Cross tabs were conducted to examine relationships between the following variables: 1) length of service and personal values; 2) length of service and expressed organizational values; 3) job classification and

personal values; and, 4) job classification and expressed organizational values.

Results of Analysis

This study was conducted in order to explore three hypotheses. The first hypothesis posited that employee survey was an acceptable method for measuring the relative strength of the personal values and the extent to which values are evident in the daily structures, processes and interactions of the organization. The method used to examine the relationship between personal and espoused values appears to be supported by the study; however, the overall results of the study, based on exploratory factor analysis, were insufficient to confirm this hypothesis.

The percentage of respondents was not large enough to support a valid principal components factor analysis. The percentage of respondents, when combined with the number of questions used to establish each factor, was not sufficiently large to validate the survey instrument with the use of the factor analysis.

There appeared to be one underlying factor or dimension in the expressed organizational values section of the survey (Items 14-42) which accounted for about 42% of the variance in the data. The personal values component of the survey (Items 1-13) was grouped into four rather than the five anticipated factors.

The second hypothesis stated that the espoused values of the College of Education would be consistent with important personal values of the employees. Descriptive data reflect mean scores for responses related to importance of espoused values in the respondents' personal lives above neutral. indicating ratings in of greater importance. No evidence was found in the descriptive data to support the third hypothesis related to expressed values.

Despite limitations of survey design, the descriptive data provided by the analysis

produced a variety of interesting results. Survey findings indicate a relationship between job classification and mean score responses to the survey items related to expressed organizational values. Refer to Figure 2 for a graphic representation of these results.

Discussion of Findings

Discussion of findings will address results of the study in the College of Education, issues related to methodology, and implications for the three factors model of shared values. Due to methodological concerns, no definitive conclusions can be drawn with regard to the presence, absence or relative strength of shared values within the College of Education. However, a number of interesting conclusions are suggested.

There does appear to be a general consistency between the relative importance of espoused organizational values and the personal values of the employees of the College of Education, as hypothesized by the model. However, based on weak descriptive data involving employee perceptions, there is evidence that those values are not clearly and consistently expressed in the daily structures, interactions and processes of the organization. This suggests a potential need for more explicit clarification of the espoused values and examination of key structures, processes and interactions through which those values are expressed. Unfortunately, methodological issues with the instrument prevent any detailed examination of specific values and/or underlying structures, processes and interactions. The findings also descriptively demonstrate an interesting relationship between the respondent's job classification and perceptions of shared values. The most striking example is that of Associate Faculty who consistently demonstrated mean score responses below those of other classifications on all measures related to shared values as expressed within organizational operations.

The study raised several methodological issues which can be addressed in further research. Definitive conclusions regarding perceptions of shared values could not be reached due to low response rate and limitations of the instrument. A minimum *n* of 100 is recommended for further studies seeking to examine results and validate the instrument using exploratory factor analysis. In addition, a primary limitation of the instrument was the low number of questions addressing each value with regard to the dimensions of structures, processes or interactions. Future instruments should contain the minimum number of questions for each dimension within each value per factor analysis protocol.

The method used to determine consistency between espoused organizational values and personal values appears to have been valid; although, a higher number of response items may again be appropriate to increase the relative strength of conclusions. However, factor analysis also identified diversity and social responsibility as a single factor. This suggests that diversity and social responsibility are not well-differentiated by the employees as distinctly different values.

Despite methodological weaknesses, there was some evidence supporting the three factor model of shared values. The finding of apparent consistency between personal values deemed as important and espoused organizational values supports the element of the model that requires such congruence. The findings regarding the level at which espoused values of the organization are expressed in daily structures, processes and interactions were inconclusive with regard to the College of Education; however, these findings do lend weak support to the contention that espoused values are not necessarily the values underlying the daily operation of an organization. That is, our results may reflect the influence of the large portion of the circle entitled "Organizational Structures, Processes and Interactions " which lies outside the parameters of

shared values. There is still reason to believe that a more precisely designed instrument can assist in the identification of key structures, processes and interactions which explicitly support or fail to support the shared values of the organization. Likewise, findings regarding the relationship between job classification and perception of the extent to which values are expressed in the daily operations of the organization suggest that job classification may be a likely intervention point in the development of an organizational culture based on shared values.

To the extent that values serve an important foundational function in the development and persistence of an organization's culture, the proposed model of shared values has great potential for further research. While larger study populations and an increased number of survey items may address some methodological issues, a more fundamental issue is worthy of study. That is, the identification of specific structures, processes and interactions which are likely, in any organization, to reflect the presence and strength of one or more shared values. For example, the researchers in this study assumed that common processes such as hiring and resource allocation would be likely to reflect specific espoused values of the organization. This assumption is not based on any evidence in the literature that these specific processes are likely reflectors of espoused values in general, or shared values in particular. The identification of specific structures, processes and interactions likely to be influenced by shared values will greatly enhance the development of more precise instrumentation for the identification and study of shared values.

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